

Administrative Officer, Medical Staff

17 AUG 1956

Chief, Records Management Staff

Audit of the Records Disposition Program, Medical Staff

1. Attached is the revised Records Control Schedule prepared by [REDACTED] in accordance with a request from your office for an audit of the Medical Staff Records Program. This Schedule supersedes the previous Schedule dated December, 1953.

2. The following significant facts are derived from the records audit:

a. There are 560.7 cubic feet of records maintained in 126 pieces of filing equipment which is valued at \$18,848.50

b. 3% of the total records have been identified as having permanent value.

c. 10% of the records consist of library material, and

d. 87% are of temporary value.

3. The immediate application of the Records Control Schedule will permit the elimination of 60 cubic feet of inactive records in the calendar year 1956 through transfer to the Records Center or by destruction in the offices. The disposition of inactive records will make available to each office much needed filing space required by accumulating current records.

4. The primary purpose of the audit was to revise the Records Control Schedule. However, other areas of the Records Management Program were also observed and general recommendations outlined in the attached survey report are submitted for your consideration.

5. The cooperative spirit of the personnel in your organization made possible the development of an effective Records Control Schedule which should be of assistance in the management of an important part of the Agency's records. [REDACTED] will be available to advise and assist your Area Records Officer in the implementation of your Records Management Program.

ATTACHMENT

MgtS/RM [REDACTED] 1(16Apr.56)

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RECORDS MANAGEMENT SURVEY OF
THE MEDICAL STAFF

GENERAL OBSERVATION

A noticeable increase in the scope of the overall Medical program was evident throughout the entire Medical Staff resulting in an increase in records holdings and filing equipment since the introduction of the Records Management Program in 1953. The records holdings have increased from 472 cubic feet which were maintained in 97 pieces of filing equipment to 560.7 cubic feet now occupying 126 pieces of filing equipment. A breakdown of the equipment inventory is attached.

RECOMMENDATIONS

1. That the Medical Staff consolidate all medical files on Agency employees into one alphabetical or numerical file which can be serviced from a central location.

At present several series of employees case files, card files and indices are located in various divisions and branches throughout the Medical Staff. These files consist of the medical charts, x-rays, health cards, immunization records, psychiatric files, and the psychological interview files, as well as locator indices. Consideration should be given to bringing together as many of these series as is practicable for both economy and efficiency purposes.

2. That a more active records disposition program be carried out.

Since the initial application of the records disposition program in December 1953, 186 cubic feet of records (the equivalent of 24 4-drawer safes) have been retired to the Records Center. The majority of these records have been transferred from the Registrar's Section and the Xray Branch. Through continued application of the disposition schedule the personnel in the Xray Branch have been able to reduce the Xray files from 187 cubic feet to 114 cubic feet and the filing equipment from 11 to 7 Xray cabinets. Such accomplishment reflects a continuing interest in the disposition program. There are, however, other areas where no retirement of records has been accomplished to date. In these areas lack of filing space is becoming a major problem. The records disposition plan provides for the retirement of inactive records from office equipment to less expensive storage areas, thereby releasing office space for active and accumulating records.

3. That the Psychiatric Division consider a re-evaluation of the personal interview files.

These files have increased from 1.5 cubic feet to 32 cubic feet since 1953, and none of the inactive records have been removed from the files. The Medical Staff previously agreed to the destruction of these files one year after they had been evaluated, except for those which become a part of the Psychiatric Interview files. The audit revealed that the disposition instructions have not been followed.

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During the 1956 audit these files were incorporated with the Psychiatric Case files and the retention period was increased to conform to that being assigned to the Medical Chart files. (Item 45) However, it is felt that such a long term retention period for these interview files is not warranted. A suggested retention period of 5 years after evaluation appears to be adequate. In any event, it is felt that these files could surely be destroyed upon separation of the employee from the Agency.

4. That the method of filing health cards, Form 295b, in the Health Rooms be changed.

In the Health Rooms two file systems are being maintained for the same type records. One system utilizes folders for each letter of the alphabet into which the health cards are filed alphabetically. This method appears to be adequate for the volume of cards accumulated. The other area has expanded its records holdings from 4 cubic feet to 16 cubic feet; much of this expansion is due to the method of filing used. Each health card is maintained in an individual acco-type folder. The card form 295b is so designed that a folder is not required for filing purposes. Guide cards may be used to designate each letter of the alphabet and they will also serve to maintain the cards in an upright position. By eliminating individual folders a savings in space will be realized to the extent that one safe could be released and, in addition a savings would result in time required to prepare the folder for the files and to fasten the health card inside the individual folder.

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INVENTORY OF
MEDICAL STAFF
FILING EQUIPMENT

<u>Type</u>	<u>Office of Chief</u>	<u>Admin Support</u>	<u>Registrar</u>	<u>P.D.</u>	<u>TSD</u>	<u>PCD</u>	<u>SSS</u>	<u>Total Units</u>	<u>Replacement Value</u>
2 dr legal safe	1	1			1			3	\$ 728.90
4 dr legal safe	3	4	1	5	7	4	3	27	8488.80
4 dr letter safe		1	2	8	6	1		18	5203.80
5 dr card safe					1	1		2	660.80
Visible Kardex		2						2	882.00
3 dr Xray Cabinets					7			7	1085.00
5 dr letter cabinets			21					21	1240.70
Bookshelves	6	3		18	9	7	3	46	558.50
Total Replacement Value									\$18848.50